

SUBJECT:STANDING OPERATING PROCEDURES (SOP) FOR OERs/NCOERs

1. **PURPOSE:** The purpose of the Standing Operating Procedure is to provide definitive guidance concerning the operation of the OER/NCOER Program at the 2290th USAH.
2. **APPLICABILITY:** This SOP is applicable to all individuals and sections within the 2290th.
3. **POLICIES:**
 - A. In order to ensure effectiveness of the OER/NCOER Program, the organizational structure will include the personnel staff, section OICs/NCOICs and their respective soldiers.
 - B. The rating scheme will be maintained on an Excel database and updated on a monthly basis by the Personnel Officer or his/her designee.
 - C. The database will be used to sort OERs/NCOERs by due dates when applicable on a monthly basis.
 - D. Raters/Senior Raters/Reviewers will be chosen IAW AR 623-105 and AR 623-205 respectively.
 - E. All OERs/NCOERs will be prepared IAW AR 623-105 & AR 623-205 respectively.
 - F. The minimum rating period is 120 days for officers and 90 days for enlisted assigned to Reserve units with 48 drills annually.
 - G. The completed 67-9-1/67-9-1a (OER Support Form) will be used by all rating officials in preparing the OER.
 - H. The OER Liaison staff will initiate a list of soldiers 90 days prior to the closing date of the OER/NCOER and forward it to the rater and rated individual.
 - I. The Rater will notify the OER/NCOER Liaison when a change in assignment is pending/imminent. The liaison will determine if a Change of Rater report will be initiated and will notify Personnel OIC to update the database rating scheme.
 - J. Section OICs will ensure that no change in duty will occur until all outstanding reports are completed.

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4. RESPONSIBILITIES:

A. Adjutant will:

1. Have the overall responsibility for the OER/NCOER program and will ensure that the program is staffed and operated in a professional and military manner IAW AR 623-105 and AR 623-205 respectively.
2. Ensure that the team members are properly trained and fully understand the regulations governing the preparation of both OERs and NCOERs.

B. OER/NCOER Officer will:

1. Be designated by the Adjutant and will be a member of the Personnel section. he/she will manage this program under the guidance of the Adjutant.
2. Be primary OER/NCOER Liaison for all sections housed in building 91 (Training, PAC, Finance, HQs and Supply).
3. Have at least two-four trained officers/enlisted personnel to assist with the processing of all OERs/NCOERs.
4. Designate and ensure proper training for the individuals who will be responsible for obtaining and verifying all information needed for OERs/NCOERs during In-Processing, Birth Month Audit and Out-Processing.
5. Develop and maintain a database on all OERs/NCOERs and their status.
6. Update the OER/NCOER database monthly and extrapolate the current rating scheme from same.
7. Distribute current copies of the rating scheme to all Section OICs at the monthly training meeting. Post updates on the Unit's bulletin board and forward a copy to the 99th RSC monthly.

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8. Submit monthly statistics to the Adjutant on the number of OERs/NCOERs that have been completed as well as the numbers that are late.
 9. Prepare a list of soldiers who have completed In-Processing each month and forward it to the appropriate Section OICs with copies of Form A (see attachment).
 10. Initiate lists of those soldiers (officer and enlisted) who are 90 days from the end of their rating period. Distribute the same to Primary Liaisons at the training meeting.
 11. Ensure that the OERs/NCOERs are typed IAW the regulations and that all information is correct prior to submission to higher headquarters.
 12. Transmit OERs/NCOERs, return copies to Senior Rater, notify personnel NCO of transmitted reports and update the database.
- C. Primary Liaisons will:
1. Be designated by OICs from each of the following sections:
 - A. Nursing Services-Designee
 - B. Professional Services-Designee
 - C. Headquarters Detachment-Adjutant
 2. Be the intermediary between OER/NCOER Officer and the section.
 3. Prepare and distribute notices 90 days from due date of reports.
 4. Track OERs/NCOERs from the time packets are distributed until completed report is ready to be forwarded to OER/NCOER Officer.
 5. Maintain APFT and HT and WT rosters as a reference for soldiers in their sections.
 6. Determine when change of rater/duty reports/annual is required to be completed and ensure their completion in a timely fashion.
 7. Work with the OER/NCOER Officer to facilitate the accurate and timely completion of all reports in their section.

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8. Keep Section OICs & OER/NCOER Officer informed of any problems areas, so that the situation can be rectified.

D. Secondary Liaisons will:

1. Be designated by the Nursing Control Team and OR Control Team as necessary.
2. Assist the Primary Liaisons to facilitate the accurate and timely completion of all reports in their section.

E. Section OICs/NCOICs will:

1. Designate rating chain of soldiers assigned to their section.
2. Ensure that all soldiers, regardless of role, will facilitate the accurate and timely completion of all reports in their section.

F. Senior Raters will:

1. Ensure that all soldiers in the rating chain know who they are and are aware of their responsibilities. Review rated officers 67-9-1/67-9-1a.
2. Ensure that all reports are completed accurately and in a timely fashion.
3. Inform the proper individuals of changes in assignments.
4. Ensure that all close out reports are completed prior to any change of duty.
5. Maintain copies of all reports.

G. Raters will:

1. Ensure that the appropriate section of DA Form 67-9-1(67-9-1a) is completed for all officers within the first 30 days of the rating period.

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2. Carry out periodic counseling sessions throughout the rating Period for both officers and NCOs. NCOs are required to be counseled at least quarterly.
3. Ensure soldiers receive notification to submit completed 67-9-1(Officers)Part IV. Ensure that the administrative data is verified for both OERs and NCOERS.
4. Complete his/her portion of the 67-9 report for officers and DA Form 2166-7 for NCOs and forward these reports to the next individual in the rating chain within the allotted time frame.

H. Rated Soldiers will:

1. Know who is in their rating scheme.
2. Know when their next report is due.
3. Provide documentation 67-9-1,67-9-1a in an accurate and timely manner to their rater.
4. Acquire time for face-to-face counseling with the rater and senior raters during the rating period. If there are problems with performance, this is the place they should be identified not at the end of the rating period.

5. PROCEDURES:

A. In-Processing

(Note: in soldiers, welcome letter, they should be asked to bring an extra copy of orders and a copy of their last or previous OER/NCOER with them)

1. During routine In-Processing each soldier will fill out the top Form A (see attached) and be given a copy of this SOP.
2. NCO/OER officer will complete bottom of Form A during the Soldiers In-Processing. Soldier will be given a copy of Form A and a support form 67-9-1,67-9-1a.
3. Soldier will have an opportunity to ask any questions about the process.

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B. Rating Period:

1. First 30 days of each Rating Period.
 - A. Section OIC will designate rater and senior rater. Nursing Service personnel receive assignments in NESD. Once designated to ward, OIC will designate rater, senior rater.
 - B. Rater will meet face-to-face or telephonically to complete the front page of the (67-9-1)/Counseling Statement.
2. Through-Out Rating Period
 - A. Soldiers will complete the back of the (67-9-1) and/or maintain a list of accomplishments throughout the rating period including HT/WT, APFT status, number of drills attended and number of AT days.
 - B. Raters will maintain administrative data on their soldiers. (HT/WT, APFT status, number of drills attended and/or AT days).
3. 90 days prior to "THRU" date of Rating Period
 - A. Liaisons will make note of these soldiers, prepare notifications and deliver them to OICs/Secondary Liaisons to disperse to the appropriate individuals.
 - B. Raters will verify administrative data with rated soldiers and complete back of (67-9-1) or final counseling. They will verify: APFT, numbers of drills attended, AT/ADT, height and weight.
 - C. Rater will complete their part of DA Form 67-9, OER or DA Form 2166-7, NCOER.
4. 60 days prior to "THRU" date of Rating Period
 - A. Rater will turn over DA Form 67-8-1 or counseling statement, with report work copy, and their portion of the report to the senior rater.
(Note: raters should maintain a copy for their records.)

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- B. Senior rater will complete his/her portion of report.
- 5. 30 days prior "THRU" date of Rating Period
 - A. Rater and Senior Rater will type report using Delrina Form Flow. They will seek assistance from Liaisons if necessary.
 - B. Senior Rater will forward completed report with any additional administrative data to liaison.
(Note: Srs should maintain a copy for their records)
 - C. Liaison will facilitate final typing of report.
- 6. Through Date of Rating Period
 - A. Primary Liaison will obtain all signatures on final report and forward final report to OER/NCOER officer.
 - B. OER/NCOER officer will review reports for accuracy and completeness and prepare them for transmittal.
 - C. OER/NCOER officer will make copies for rated soldier, senior rater, etc.
- 7. 30 days past "THRU" Date
 - A. OER/NCOER officer will transmit OERs/NCOERs, return copies to Senior Rater, notify Personnel NCO of transmitted reports and update the database.
 - B. Personnel NCO will update 201 files and SIDPERS
- C. BIRTH MONTH AUDIT
 - 1. All officers should visit their respective section liaison to coordinate record checks regarding their DA Form 67-9-1.
 - 2. Each enlisted soldier should know the date of their last counseling statement. Each soldier should coordinate with his/her respective sections relative to this function.

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3. The following information will be verified with every soldier at Birth Month Audit: Name, Rank, SSN, DOR, MOS.
4. Database will be reviewed to determine: date of last report, current rater, senior rater and reviewer, and any outstanding reports.
5. Questions about the OER/NCOER system should be answered if possible during this time.
6. When all of this information is checked and verified then the Birth Month Audit Checklist be initiated to indicate that the soldier is ready depart the unit.

D. OUT-PROCESSING

1. The Personnel Section will not allow soldiers to out-process until OER/NCOER Officer has verified that all outstanding reports have been completed.

E. POC for this action is the Adjutant at (202) 782-0098/6065/6066.

**DENNIS DESILVEY
COL, MC
COMMANDER**

DISTRIBUTION:

1 each - Chief Nurse
1 each - Nursing Liaison
1 each - Chief of Professional Services
1 each - Professional Services Liaison
1 each - Personnel Officer
1 each - CSM
1 each - File

